

# ProjectWise Deliverables Management Workflow

**NOTE:**

**Organization** = Company registered with Bentley

**Transmittal** = Data sent outside of organization (Outgoing)

**RFI** = Request For Information

**Submittal** = Data received into an organization (Incoming)

**Participants** = Someone assigned to a project. Can be an internal or external participant

**Draft** = A partially completed package that can be edited prior to being transmitted

**Package** = Proposed set of documents being transmitted or submitted

Remember: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

## External Participants – Accepting Invitations/Bentley Account Creation Instructions:

1. The external participant will receive an invitation to exchange deliverables using ProjectWise Deliverables Management on a GDOT project. Click “**View Invitation**”

You've been invited to collaborate!

**Glenn Williams** from **Georgia DOT** invites your organization to collaborate on the **0009990 - Rockdale - Roundabout - SR 138 @ CR 8-CR 15** project.

Click "View invitation" to get started.



Link not working? Try pasting this link into your browser:

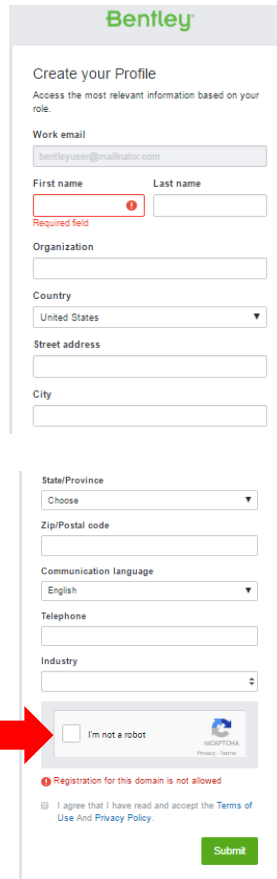
<https://connect-supplychainportal.bentley.com/external-invite/invite-e0ab7b11-eef0-4018-b5a4-958126bcd6ea-f376ec58-4931-4cee-a13f-feb74b26a126>

### To Create a New Bentley Account

If you already have a Bentley account, proceed to **Step 10**.

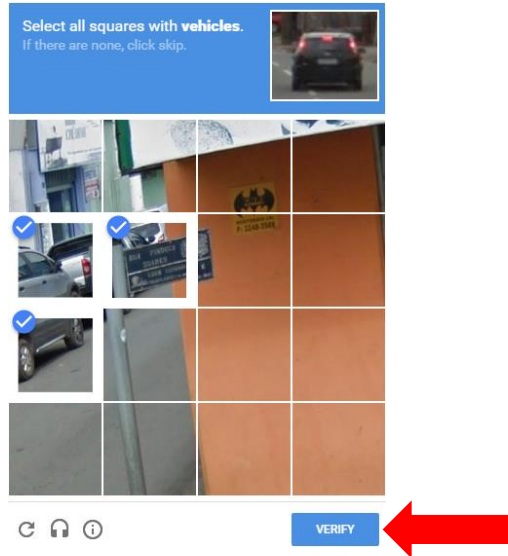
2. The system will check for accounts associated with your email address. If an account is found, skip to step 9. If no account is found using your email address, you'll be routed to the "Create your profile" page.

3. Enter information in order to create the account (see below).

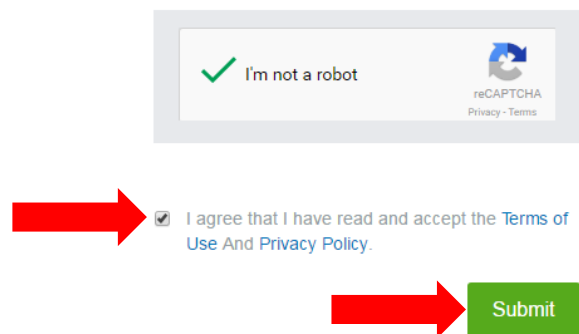


The image shows a screenshot of the Bentley 'Create your Profile' form. The form is titled 'Create your Profile' and includes a sub-header 'Access the most relevant information based on your role.' The form fields are: 'Work email' (pre-filled with 'bentleyuser@mailinator.com'), 'First name' (with a red error icon and 'Required field' text), 'Last name', 'Organization', 'Country' (dropdown menu showing 'United States'), 'Street address', 'City', 'State/Province' (dropdown menu showing 'Choose'), 'Zip/Postal code', 'Communication language' (dropdown menu showing 'English'), 'Telephone', 'Industry' (dropdown menu), and a CAPTCHA section with the text 'I'm not a robot' and a red arrow pointing to it. Below the CAPTCHA, there is a red error message: 'Registration for this domain is not allowed'. At the bottom, there is a checkbox for 'I agree that I have read and accept the Terms of Use And Privacy Policy.' and a green 'Submit' button.

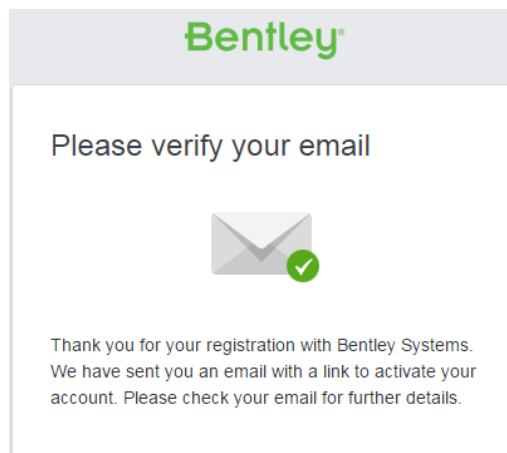
4. Select the ***“I’m not a robot”*** box.
5. Follow the prompt, select pictures to verify that you’re creating the account. ***Select “Verify”***.



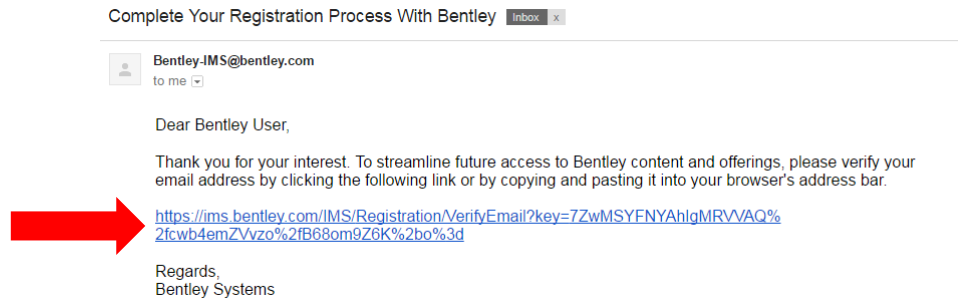
6. Accept Terms of Use and Privacy Policy, click ***“Submit”***.



7. After clicking Submit, check your email.



8. Click the link to create a password and complete the registration process.



9. Create a password for your new Bentley account. The password will not expire. Click Submit. Go back to the invitation in your email and click the ***"Accept Invitation"*** link. ***Proceed to Step 10.***

A screenshot of the Bentley "Create Password" form. The form has a header with the Bentley logo. Below the header, it says "Create Password". There are two input fields: "Password" and "Repeat password", both containing masked text (dots). A green "Submit" button is at the bottom right. A red arrow points to the "Submit" button.

### ***Existing Bentley Account Holders***

### ***Adding Participants***

10. Once you have logged in using your Bentley account, select ***"Accept Invitation"***

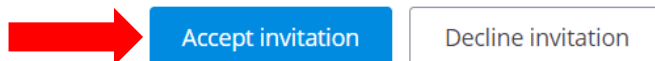
**You've been invited to collaborate!**

**Glenn Williams** from **Georgia DOT** invites your organization to collaborate on the **"0009990 - Rockdale - Roundabout - SR 138 @ CR 8-CR 15"** project.

You've been invited as the primary point of contact for **Calance**.

Click "Accept invitation" to get started.

[Advanced options](#)



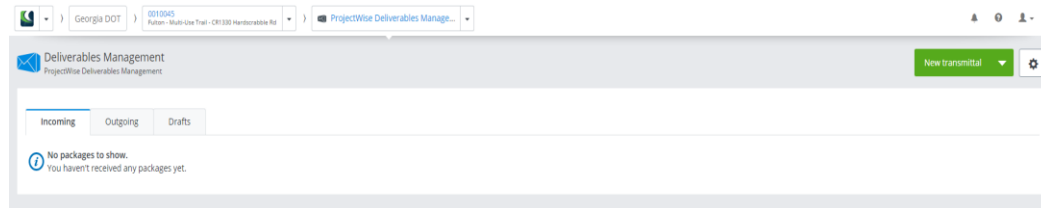
11. Service is enabled. You're now ready to exchange deliverables for this project.

### **Adding Project Participants**

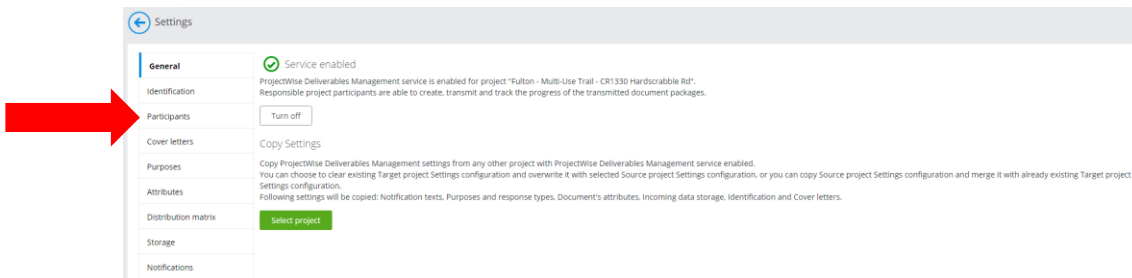
12. Click on the Deliverables Management tile of the new project.



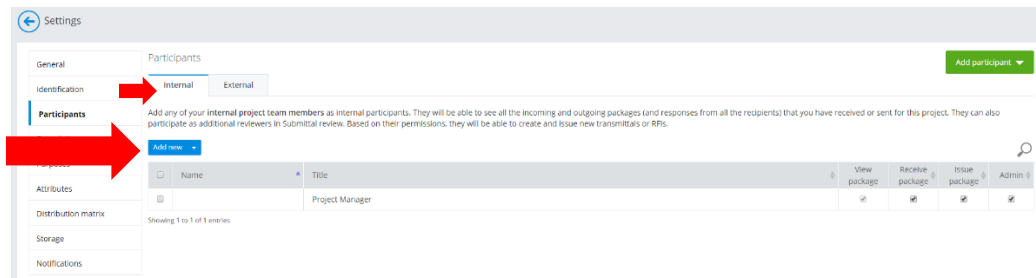
13. Click the **"Settings"** button in Deliverables Management.



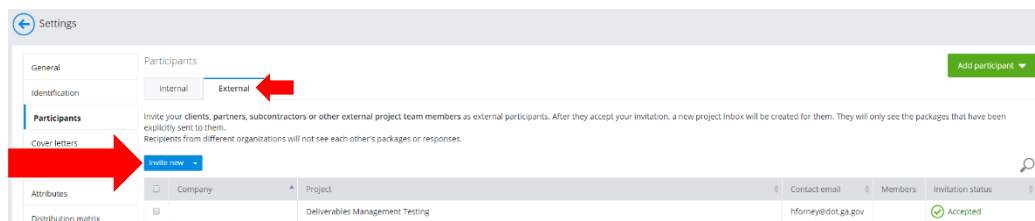
a. Click **"Participants"**



b. To add internal participants select **"Add new"** from the internal tab.



c. To invite external participants select **"Invite new"** from the external tab.



14. Enter participant's email address, title, and set their permissions. Select **"Add new"**

The screenshot shows a modal window titled "Add new participant" with a close button (X) in the top right corner. The form contains three main sections: "Email", "Title", and "Permissions".

- The "Email" section has a text input field. A red arrow points to this field.
- The "Title" section has a dropdown menu with "Team member" selected. A red arrow points to this dropdown.
- The "Permissions" section has a list of checkboxes:
  - ☐ View package (can also participate in internal reviews as additional reviewer)
  - ☒ Receive package
  - ☒ Issue package
  - ☐ Approve RFI response
  - ☐ Project administratorA red arrow points to the "Receive package" and "Issue package" options.

At the bottom right of the form are two buttons: "Add new" (green) and "Cancel" (white). A red arrow points to the "Add new" button.

- a. **View Package** – Participant will be able to see all incoming packages/submittals
- b. **Receive Package** – Participant will be able to receive packages/submittals
- c. **Issue Package** – Participant will be able to submit packages/submittals

15. Repeat this process to add additional participants.